Digital Certificate and CDC Programs

A Guide for using the Secure Data Network to Get a Digital ID Certificate and to Enroll in a CDC Program

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Introduction

This enrollment guide provides step-by-step instructions for obtaining a digital ID certificate using the CDC Secure Data Network (SDN) and for enrolling in a CDC program. This guide is for enrollments using Netscape Navigator and Internet Explorer only.

You will use the following procedures in this order:

- 1. Verify your system requirements and administrative rights.
- 2. Access the Secure Data Network and accept the subscriber agreement.
- 3. Apply for a CDC digital ID certificate and enroll in a CDC program.
- 4. Create, safely store, and then enter your challenge phrase.
- 5. Check your e-mail.
- 6. Download your digital ID certificate.
- 7. Install your digital ID certificate.
- 8. Make a copy of your digital ID certificate
- 9. Optionally, restore or move your digital ID certificate

Getting Started

Before you contact the program administrator to apply for a digital certificate, make sure you have administrative rights for your PC and you have the following system requirements:

System Requirements

Make sure you have the following system requirements:

- v Intel-based system with a 486 CPU or greater
- v Windows 98, Windows NT 4.0 or greater
- v Internet connectivity
- Internet Explorer 5.x, Netscape Communicator 6.x, or greater
- Browser cipher strength 128 bit or greater

Administrative Rights

You must have administrative rights on your PC before you can apply for a digital ID certificate. To determine if you have administrative rights do the following steps or ask your IT support to verify them for you. These steps may vary depending on the type of system you have.

For Windows XP/2000/NT

- 1. Click Start > Control Panel > Administrative Tools > Computer Management.
 The Computer Management dialog opens.
- 2. Expand **Local Users and Groups** and then select **Groups**. A list of **Groups** appears in the panel on the right.
- 3. Open the Administrators Group. The Administrators Properties dialog opens.
- 4. Select the **General** tab and then verify your user ID appears in the **Members** panel.
- 5. If your user ID does not appear, contact your IT Support to give you privileges. For CDC users, contact IT Support at http://itsupport/oaa/login.jsp

For Windows 98

If you are using Windows 98, you automatically have administrative privileges and you do not need to check for them.

To Access the Secure Data Network and Accept Subscriber Agreement

 After you have verified that you have administrator rights on your PC and your PC meets the requirements listed above, contact your program administrator or CDC SDN Support at (800) 532-9929 option 1 (If you are outside Atlanta call (770) 216-1276) to get the password to access the SDN enrollment site. Store your password in a secure place.

We recommend you write your password on a piece of paper and put it in your wallet or a locked desk drawer, or create a MS Word or Notepad file on your computer to store them. You will create and use several passwords during the enrollment process and afterward. Please keep track of them. If you lose or forget your password, you may have to restart the process from the beginning.

2. After you have the password and Go to https://ca.cdc.gov. The Centers for Disease Control and Prevention – Digital ID Enrollment page appears.



- 3. In the **Password** field, type the password, which was given to you by your program administrator or SDN Support representative, and then click **Accept.** Information about system requirements and digital ID certificates appears. Remember that passwords are case-sensitive.
- 4. Scroll to the bottom of the page to the **Digital ID Subscriber Agreement** heading, go to the second paragraph which reads:

"Complete terms for the VeriSign CPS and Digital ID Subscriber Agreement can be found https://example.com/here."

- 5. Click on the **here** link under the **Digital ID Subscriber Agreement** heading on the web site. The Verisign **Products and Services** page appears.
- 6. Under the **Digital ID Practices** heading, click on **Subscriber Agreements**, then under the **Managed PKI Subscriber Agreements** heading, click on **Digital ID Subscriber Agreement**.

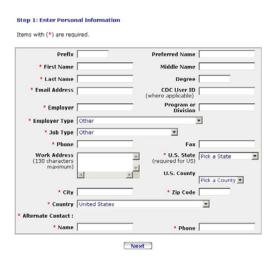
7. Read the Client ID Subscriber agreement and then click the Back button on your browser three times to go back to the CDC Digital ID Enrollment page.



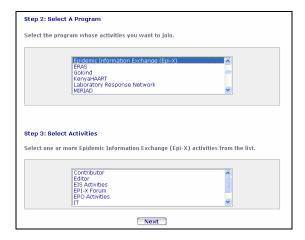
- 8. Click the **Enroll** button. The enrollment form appears.
- 9. Follow the steps in the following procedure "To Apply for a CDC Digital ID Certificate."

To Apply for a CDC Digital ID Certificate

Digital ID certificates ensure that you and the CDC are communicating privately and securely. They are also expensive and are paid for by your federal tax dollars. You will need to create and use several passwords during this process. Please create a Notepad or MS Word file to store them or write them on a piece of paper and put them in your wallet or locked desk drawer.



- On the first page of the enrollment form, enter as much information as possible and then click the **Next** button. All fields with a red asterisk must be complete. Make sure you enter your work e-mail address, not your personal e-mail address. The information you need to install your digital certificate will be sent to the e-mail address you indicate.
- A pop-up message appears. Verify your e-mail address listed in the message is correct and then click **OK**. If your e-mail address in incorrect, click **Cancel**, change your e-mail address, then click **Next**. The **Select a Program** page appears:



- From the first list box, select **ONE** program in which you want to enroll and in the second list box, select one or more activities for the program you chose and then click **Next**. Later, after you have received your digital certificate, you can enroll in more activities.
- 4. Follow the steps in the procedures "To Create and Safely Store Your Challenge Phrase" and "To Enter Your Challenge Phrase."

To Create and Safely Store Your Challenge Phrase

For security, you will create a challenge phrase that you will use every time you access SDN. (This challenge phrase is different from the password you used to log on to the SDN enrollment site). You will use this challenge phrase along with your Digital ID to authenticate yourself as an SDN user.

To make sure you remember your challenge phrase, we recommend you store your challenge phrase in a safe place. Open MS Word or Notepad and create a file – type the challenge phrase and then save the file or write the challenge phrase on a piece of paper and put it in a secure place such as your wallet or a locked desk drawer. Make sure you write down which letters are upper case and which are lower case. The challenge phrase is case sensitive.

Use the following guidelines to create your challenge phrase:

- Be at least eight characters long.
- Contain only English letters and numbers.
- Do NOT use the plus (+) symbol. If you use the plus (+) symbol, the challenge phrase will accept the challenge phrase but the challenge phrase will not let you access the software.
- Cannot contain any part of your name or e-mail address.
- Cannot spell a word unless the word has three or more numbers or symbols before or after the word or the word has numbers or symbols within the word.
- Cannot contain more than two consecutive characters.

- Contain at least four different numbers or letters.
- Challenge phrases are case-sensitive. Note the letters that are upper and lower case.

To Enter Your Challenge Phrase

- 1. In the **Challenge Phrase** field, type your challenge phrase.
- 2. In the **Confirm** field, type your challenge phrase exactly the same way you typed it in the **Challenge Phrase** field.
- 3. **BEFORE** you click the **Next** button, open MS Word or Notepad and create a file. Make a note of the letters that are upper and lowercase. Type the challenge phrase and then save the file. If you do not want to create a file, write down the challenge phrase, note the letters that are upper or lower case, and then safely store the note in a locked drawer or your wallet.
- 4. Click Next. The Digital Certificate Request Received message appears.
- Within 12-72 hours, you will receive an e-mail with more instructions. Check your e-mail daily. If you do not receive an e-mail within 72 hours, contact your program administrator or CDC SDN Support at (800) 532-9929 option 1. If you are outside Atlanta, GA call (770) 216-1276.
- 6. Follow the steps in the procedure "Check your E-mail."

Check your E-mail

 You will receive an e-mail from CDC SDN Enrollment. The subject line will read SDN Enrollment Approved and the body of the message will look similar to the following:

https://ca.cdc.gov/sdncode/sdnapp/servlet/CertServlet?usertoken=4
b43b5c3418b0fd5bfb6ced146d1a820

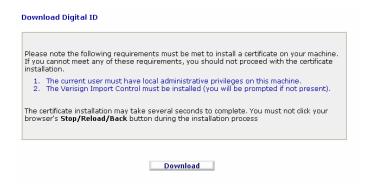
- 2. Before you open the link on the web site, open the MS Word or Notepad file you created (or open the note you wrote to yourself and stored in a locked drawer or your wallet).
- 3. Click on the link on the web site (not the link in this document). The **Digital ID Enrollment** page appears.
- 4. Type your challenge phrase (remember that the letters are case sensitive) and then click **Login**. The **Confirm Personal Information** page appears.
- 5. Verify your information and do one of the following:
 - If your information is correct, click **Confirm**. The **Download Digital ID** page appears.
 - If you need to change your information, click **Update**, make changes and then click **Submit**. Your request will be reviewed and you will receive another e-mail within 12-72 hours with further instructions.
- 6. Read "Downloading Your Digital ID Certificate" and then follow the steps in the procedure "To Download Your Digital ID using Netscape" or "To Download Your Digital ID using Internet Explorer".

Downloading and Installing Your Digital ID Certificate

The procedures for downloading and installing your digital ID certificate depend on the type of browser you use. If you use Internet Explorer to access the Internet, follow the steps in "To Download and Install Your Digital ID Certificate Using Internet Explorer". If you use Netscape to access the Internet, follow the steps in "To Download Your Digital ID Certificate Using Netscape Navigator".

To Download and Install Your Digital ID Certificate Using Internet Explorer

After you have confirmed the information is correct in the personal information page, the **Download Digital ID** page appears. To download your digital ID onto your local machine, do the following:



- From the **Download Digital ID** page, click the **Download** button. A message appears which asks you to wait. Afterward you will receive a message, which asks you to wait. Do nothing.
- 2. You will receive a Security Warning message that looks similar to the following. Click **Yes**.



3. You will receive the following message, which indicates your digital ID certificate was successfully downloaded and installed:



4. Follow the steps in the procedure "Making a Copy of Your Digital ID Certificate".

To Download Your Digital ID Certificate Using Netscape Navigator

1. After you have confirmed the information is correct in the personal information page, the **Download Digital ID** page appears. To download your digital ID onto your local machine, do the following:



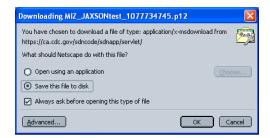
From the **Download Digital ID** page, click the **Download** button. A message appears which asks you to wait. Afterward you will receive a message similar to the following:

Next step... Install the Encryption Digital ID •Located in this directory: ../p12\ •In the file named: #II2_JAX30Weest_1077724745.p12 Download P12 File •The password is: sytdky#spb_#XYER0 WARNING The digital certificate cannot be loaded automatically into Netscape, and requires that you download the certificate install it into your browser. The password provided above will allow you to perform the certificate installation, and should be provided when prompted. If you lose this password, you must contact CDC SDN Support.

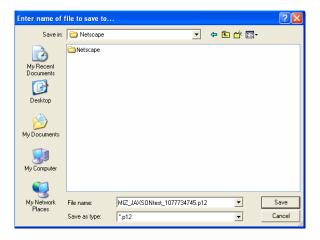
Your Digital ID has been created and is ready to be installed.

- Read the message carefully. The message tells you in what directory it will load your digital ID, the name of the file the digital ID is called and most importantly, the password you will need to install it.
- 4. We recommend you copy and paste the entire Install the Encryption Digital ID message into the body of the Notepad or MS Word file you created for your passwords or carefully write down the information. The password is lengthy please double-check it after you write it down. Remember that the password is case sensitive.

5. After you have copied and pasted the information into a file or you have written down the information, click the **Download P12 File** button. A message similar to the following appears:



6. Make sure the **Save this file to disk** option is selected and the **Always ask** before opening this type of file check box is selected, then click **OK**. The **Enter** name of file to save to dialog appears which looks similar to the following.



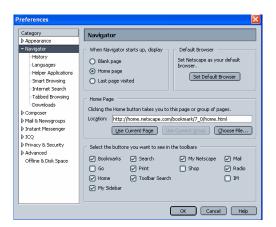
7. Click Save. You have downloaded the certificate onto your computer. Next, change your Netscape Master Password and then install the certificate using the following procedures "To Change Your Netscape Master Password and Install Your Digital ID Certificate."

To Change Your Netscape Master Password and Install Your Digital ID Certificate Using Netscape

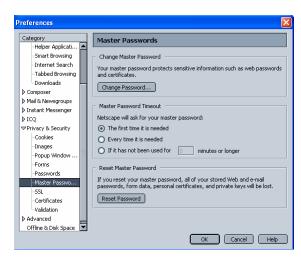
Before you install your digital ID certificate, you need to change your Netscape master password. This password is NOT any of the ones we've mentioned earlier. However, to simplify the process, we recommend you change your master password to be exactly the same as your challenge phrase, which you created earlier. See **To Create and Safely Store Your Challenge Phrase**.

After you have confirmed the information is correct in the personal information page, the **Download Digital ID** page appears. To change your **Netscape** master password and install your digital ID do the following:

 From your Netscape browser menu bar, go to the Edit menu and then select Preferences. The Preferences dialog appears which looks similar to the following:



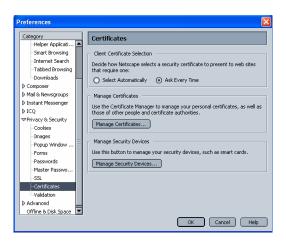
 Expand the Privacy and Security menu in the Category panel by clicking on it, and then select the Master Passwords option. The Master Passwords panel opens on the right side of the Preferences dialog and looks similar to the following:



3. Make sure the The first time it is needed option is selected, click the Change Password button and then click OK. The Change Master Password dialog appears and looks similar to the following:



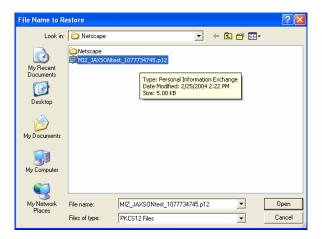
- 4. In the New password field, type your new password and then type it again in the New password (again) field. We recommend you use the challenge phrase you created earlier when you completed the To Create and Safely Store Your Challenge Phrase section.
- 5. Click OK.
- 6. In the **Category** panel on the left side of the **Preferences** dialog, select **Certificates**. The **Certificates** panel opens on the right side of the **Preferences** dialog and looks similar to the following:



7. Make sure the Ask Every Time option is selected and then click the Manage Certificates button. The Certificate Manager dialog appears and looks similar to the following:



8. Click the **Import** button. The **File name to restore** dialog appears and looks similar to the following:



Select the file containing the certificate and then click **Open**. A prompt appears
which asks you to enter the master password for the Software Security Device,
which looks similar to the following. (This is the same password you just used in
step 4 of this procedure.)



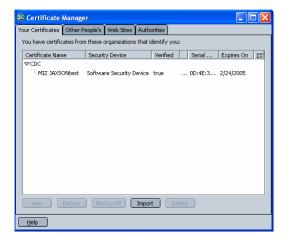
10. Type the password (the same password you created in step 4 of this procedure) and then click **OK**. The **Password Entry Dialog** appears which asks for the password you used to encrypt this certificate backup. It looks similar to the following:



11. Open the MS Word or Notepad file you created for your passwords or open the note you wrote containing the passwords and then carefully type the password into the **Password** field and then click **OK**. Remember that the password is case sensitive. You will receive the following Alert:



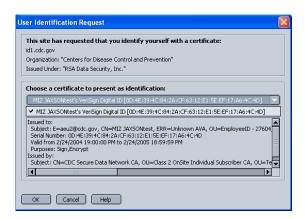
12. Click **OK**. The **Certificate Manager** dialog displays your certificate. It will look similar to the following:



- 13. Make sure the status of the certificate, under the Verified column reads true.
- 14. Test your digital certificate using the following procedure "**To Test Your Digital ID Certificate**."

To Test Your Digital ID Certificate

- 1. Open your **Netscape** browser. **Start > Netscape**.
- 2. In the address field, type https://sdn.cdc.gov and then press Enter. The following User Identification Request dialog appears:



- In the second panel, your certificate is listed under the words Choose a
 certificate to present as identification. If you have more than one certificate,
 click the down arrow on the right side of the name of the certificate. A list of
 certificates appears.
- 4. Click on the certificate you want to test and then click **OK**. A prompt appears which looks similar to the following:



- 5. Enter your Netscape master password (this is the same master password you created in the procedure *To Change your Netscape Master Password and Install your Digital ID.*)
- 6. You will receive a Security Warning. Click OK.
- 7. The Secure Data Network site appears. Enter your challenge phrase. (This is the same challenge phrase you created in the procedure *To Create and Safely Store your Challenge Phrase*). Check your MS Word or Notepad file that you created or retrieve the note you wrote to yourself.

Remember your challenge phrase is case sensitive. If you have numbers in your challenge phrase, be sure that your **Num Lock** light on your keyboard is on before you enter your challenge phrase.

- 8. After you successfully enter your challenge phrase, your SDN activities page appears. After you make a copy of your digital ID certificate, you can use SDN to enroll in the CDC programs.
- Make a copy of your digital ID certificate by following the instructions in "Making a Copy of your Digital ID Certificate" and "To Make a Copy of your Digital ID Certificate Using Netscape."

Making a Copy of Your Digital ID Certificate

Digital ID certificates are expensive and you pay for them with your federal tax dollars. To minimize the cost of replacing certificates, we strongly recommend you create a copy of your digital ID certificate by saving it to a diskette. This procedure is also called "backing up" or "exporting" your certificate.

The procedure to make a copy of your certificate varies depending on the type of browser you use, Internet Explorer or Netscape. If you use Internet Explorer, follow the steps in "To Make a Copy of Your Digital ID Certificate Using Internet Explorer." If you use Netscape, follow the instructions in "To Make a Copy of Your Digital ID Certificate Using Netscape."

To Make a Copy of Your Digital ID Certificate Using Internet Explorer

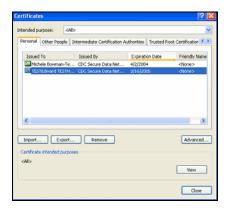
- If you are looking at the Congratulations message, your Internet Explorer should already be open. If not, open Internet Explorer: Click Start > All Programs > Internet Explorer.
- 2. From the **Tools** menu, select **Internet Options**. The **Internet Options** dialog opens and looks similar to the following:



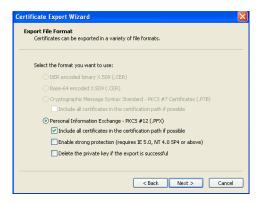
3. Select the **Content** tab. Your **Internet Options** dialog box should look like the following:



4. Select the **Certificates** button. The **Certificates** dialog box opens:



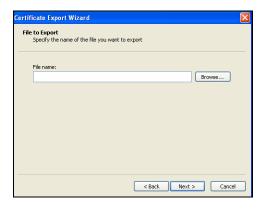
- 5. If you have more than one certificate, look at the date in the Expiration Date column and the name in the Issued By column. Select the certificate, which has the appropriate date and issuer, and then click Export. The Certificate Export Wizard dialog box opens.
- 6. Click Next.
- 7. Select the **Yes**, **export the private key** radio button and then click **Next**. Your **Certificate Explorer Wizard** should look similar to the following:



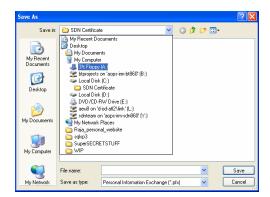
8. Select the Include all certificates in the certification path if possible and deselect (uncheck) the Enable strong protection and Delete the private key if... check boxes, then click Next. The password dialog appears:



- 9. Create a password. We recommend you use your challenge phrase that you used earlier. After you type your password in the **Password** and **Confirm Password** fields, write down and safely store this password. Call this the "private key" password. We recommend you put the piece of paper with the "private key" on it in your wallet or create a MS Word file or Notepad file and type your password in it and save it.
- 10. Click **Next**. The **File to Export** dialog opens.



11. Click the **Browse** button and navigate to the 3 ½ **Floppy (A:)** drive. For example, when you click the **Browse** button, the **Save As** dialog appears and looks similar to the following:



- 12. Select the 3 ½ Floppy (A) drive, insert your floppy diskette in the slot in your computer, type sdncert in the File name field at the bottom of the Save As dialog and then click Save. The Certificate Export Wizard appears and lists the location of the cert as C:\SDN Certificate\sdncert.pfx.
- 13. Click **Next**, then click **Finish**. A **Certificate Export** message appears which reads **The export was successful**.
- 14. Click **OK**. The **Certificates** dialog is still open. Click **Close**.
- 15. The **Internet Options** dialog is still open. Click **OK**.

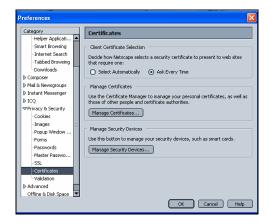
16. Remove the 3 ½ floppy diskette from your computer, label it **SDN digital ID Certificate** and then store it in a safe place. Keep your passwords and the certificate separate.

To Make a Copy of your Digital ID Certificate Using Netscape

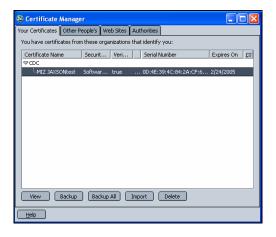
- If it is not already, open your Netscape browser. Click Start > All Programs > Netscape.
- 2. From your **Netscape** browser menu bar, go to the **Edit** menu and then select **Preferences**.



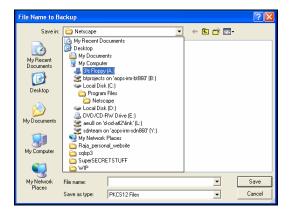
3. The **Preferences** dialog appears. Under the **Category** heading, double-click the Privacy & **Security** option, and then select **Certificates**. Your **Preferences** dialog should look similar to the following:



4. Click **Manage Certificates**. The **Certificate Manager** dialog appears and looks similar to the following:



5. Select your certificate and then click **Backup**. The **File Name to Backup** dialog appears.



- 6. Navigate to the 3 ½ Floppy (A) drive: Click the down arrow on the right side of the **Save In**: drop-down list and then select **3** ½ **Floppy (A)**.
- 7. Insert a diskette (3 ½ floppy) into the drive on your computer.
- 8. In the **File name** field, type **sdncert** and then click **Save**. A prompt appears, which asks you for the master password for the Software Security Device (which you created in the procedure called "**To Change Your Netscape Master Password and Install Your Digital ID Certificate**"). We recommended that you use your challenge phrase. Type the master password and then click **OK**.



9. The **Choose a Certificate Backup Password** dialog appears. Type the certificate backup password in both fields and then write it down and keep it in a safe place. We recommend that you make your backup password the same as your challenge phrase.



10. Click **OK**. You will receive the following message, which indicates you successfully saved your certificate to a diskette. Click **OK**.



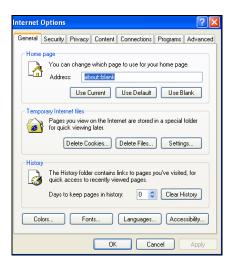
11. Remove the diskette from your computer and store in a safe place. You are now ready to use your CDC program and activities. Go to https://sdn.cdc.gov.

Restoring and Moving your Digital ID Certificate

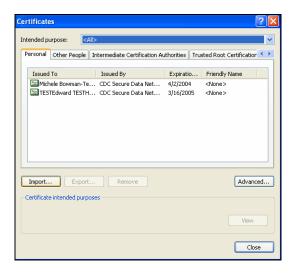
Digital ID certificates ensure that you and the CDC are communicating securely and privately. If you lose your digital certificate or if you want to use your certificate on another computer, use the following procedure to restore your certificate from the copy you made in the previous procedure. The procedure is different for Netscape and Internet Explorer. Use the procedure that corresponds to your browser.

To Restore your Digital ID Certificate using Internet Explorer

- If you are restoring or moving your digital ID certificate to a computer other than
 the computer, to which you originally downloaded it, make sure you have
 administrative privileges on the second computer and that the second computer
 meets the system requirements. See the "Getting Started" section in this guide
 for details.
- 2. Open Internet Explorer. Click Start > All Programs > Internet Explorer.
- 3. Insert the 3 ½ Floppy diskette, which you made earlier, into the computer to which you want to restore or move the certificate.
- 4. From Internet Explorer, click on the **Tools** menu and then select **Internet Options**. The **Internet Options** dialog opens and looks similar to the following:



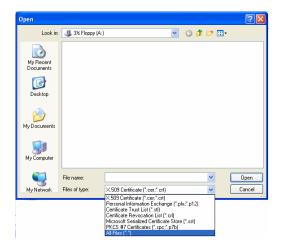
5. Select the **Content** tab and then click on the **Certificates** button. The **Certificates** dialog opens and looks similar to the following:



6. Click the **Import** button. The **Certificate Wizard Import** dialog appears. Click the **Next** button. The **File To Import** panel appears and looks similar to the following:



7. Click the **Browse** button and then navigate to the 3 ½ Floppy (A) drive. Insert the 3 ½ floppy diskette, to which you copied your certificate, into your computer.



- 8. Click on the **Files of type** list box and select **All Files (*.*)**. Your certificate should appear. We recommended you name it **sdncert**.
- 9. Select the certificate and then click the **Open** button. When the **File to Import** panel appears, click **Next**. The **Password** panel appears in the Certificate Import Wizard and looks similar to the following:



10. Type the password (we recommended you use the same password as your challenge phrase), leave the check boxes deselected (unchecked) and then click Next. The Certificate Store panel appears and looks similar to the following:

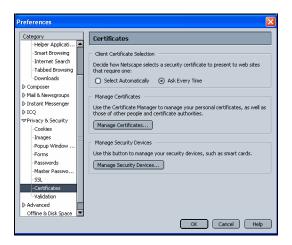


- 11. Select the **Automatically select the certificate...** radio button and then click **Next**. The **Completing the Certificate Import Wizard** appears.
- 12. Click **Finish**. You will receive a message that reads, "The import was successful." Click **OK**, close the **Certificates** dialog, and then click **OK** to close the **Internet Options** dialog.

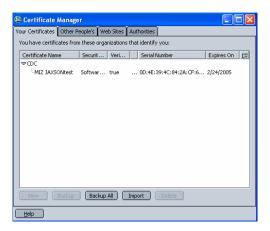
To Restore your Digital ID Certificate using Netscape

If you are restoring or moving your digital ID certificate to a computer other than
the computer, to which you originally downloaded it, make sure you have
administrative privileges on the second computer and that the second computer
meets the system requirements. See the "Getting Started" section in this guide
for details.

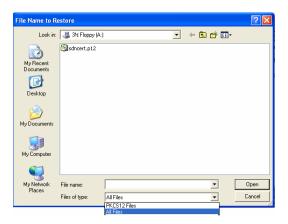
- 2. Open Netscape. Click **Start > All Programs > Netscape**.
- 3. Insert the 3 ½ Floppy diskette, which you made earlier, into the computer to which you want to restore or move the certificate.
- 4. From Netscape, click on the **Edit** menu and then select **Preferences**. The **Preferences** dialog opens.
- 5. Double-click the **Privacy and Security** option and then click **Certificates**. The **Certificates** panel looks similar to the following:



6. Click **Manage Certificates**. The **Certificates** dialog box opens and looks similar to the following:



7. Click **Import**. The **File Name to Restore** dialog appears. In the **Files of Type** list box, select All Files.



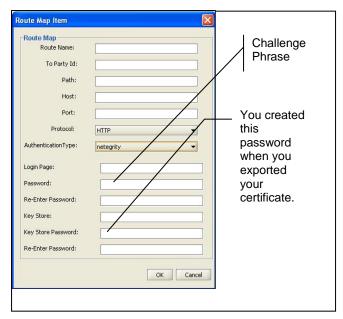
- 8. Select the certificate, which we recommended you name **sdncert**, and then click **Open**. The **Prompt** appears.
- 9. Type your master password and then click **OK**. We recommended that you use the same password as your challenge phrase.
- 10. The Password Entry Dialog appears. We recommended that you use the same password as your challenge phrase. Type the password and then click OK. You will receive the following alert message indicating your certificate was successfully moved or restored:



- 11. Click **OK** to close the **Alert** message and then close any other open dialog boxes.
- 12. Remove the diskette from your computer and keep it in a safe place.

Using your Passwords in PHINMS

The passwords, challenge phrases and other security details are hard to keep up with and pose another challenge when you use PHINMS because the terms used are different from the ones in the digital certificate enrollment process. This section of the enrollment guide gives you a direct comparison of the two systems so that you can have



a smooth transition when you configure the PHINMS system. Print this guide and keep it with you as you configure PHINMS.

When you configure PHINMS, you will use the **Route Map Item** dialog in the Sender Configuration.

If you selected the "netegrity" **Authentication Type**, use certphrase/login.fcc. If you select the **Client** cert type, you will not use the **Login Page** field.

The Password field in PHINMS is the challenge phrase you created during the SDN enrollment process. It is the one WITHOUT the special characters.

The **Key Store** is the location and the name of the certificate you stored on your machine when you exported the certificate from your browser.

The **Key Store Password** is the password you created when you exported the certificate. For more details, see the online help at www.cdc.gov/phin/phinms, click on the PHINMS Support link and then click on the online help. It provides step-by-step instructions for configuring the software and for using the software after you install it.